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DE/Pers/SP

11 MAR 1970

MEMORANDUM FOR: Deputy Director for Support
SUBJECT : The FY 1972-1976 Program Call
REFERENCE : ExDir Memo dtd 22 Oct 69, subj: Program Call
FY 1972-1976 fwd by SPA/DDS 12 Nov 69

Attached, as requested in referent memorandum, are five
copies of the Program Call for the Office of Personnel.

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Robert S. Wattles
Director of Personnel

Att

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OP/PAD/ bw (10 Mar 70)

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Revised 10 March 70

PROGRAM SUBCATEGORY: PERSONNEL

A. Overview Statement

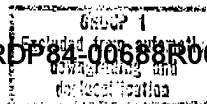
1. The factor shaping our personnel efforts for the period FY 72-76 is the stabilizing of Agency structure and strength after a two-year period of retrenchment. Staffing complements must be updated and be realistic in depicting position requirements as to occupational mix, numbers and grades. There will be increased emphasis on job design to improve job satisfaction and the allocation and utilization of our human resources. The problems of personnel flow and of internal career management in a "closed" system require continuous study and the development of centralized transfer and placement capabilities. Some degree of career pathing on a systems basis following occupational rather than organizational lines should be undertaken as promotional opportunities shrink. The demands of an ever-increasing employees benefits and welfare program for staff and non-staff employees must be met. The impact of SIPS on personnel records and reporting must be absorbed and the capabilities of ADP fully exploited. There will be a residue of dislocation and in-balance in personnel distribution to be handled. The statement on page 40 of the Agency Planning Assumptions for FY 72-76 applies in a very special way to the Office of Personnel in the years ahead.

"We must also re-examine the consequences of restricting new entry of new employees while preserving the employment of employees who are past the point of useful productivity. To safeguard the vitality of the Agency, to observe the rights and career interests of its employees, and to provide incentive to skill and innovation are essential tasks that are difficult to accomplish in full harmony."

2. Our Program Call submission deals mainly with changes in emphasis although there are two new programs to be administered, namely, the Voluntary Investment Program and the Non-Staff Annuity Program. We propose to accomplish the FY 72-76 objectives by reprogramming and redeploying of present resources to a major degree. Requests for new positions are limited to the Planning and Control and the Special Programs Elements, caused in the latter case by the extending of staff-type benefits to non-staff employees and by the necessity of the servicing of our increasing retiree and "about to be" retiree populations.

3. As to progress, the Agency has been kept fully staffed while keeping a low profile on the campus and balancing outflow and input within ceiling constraints. The complete retiree program is on the move and functioning in one organizational component. Our administrative research has discovered and structured fundamental personnel problems dealing with Personnel Flow and Succession Development for consideration by top management; and development work leading to further automation of our records and reporting proceeds apace with SIPS.

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PROGRAM ELEMENT: SPECIAL PROGRAMS

A. Objectives

1. The primary objective is to meet growing demands, such as new programs or expanded service and increasing workload: to utilize current capabilities to the utmost; and to exploit to the fullest any major savings available through automation.

2. There will be two new programs to administer: the Voluntary Investment Program and the Non-Staff Annuity Program. In addition, we will see in the planning period the largest number of employees reaching retirement age or becoming eligible for retirement in the Agency's history. This increased workload must be serviced without sacrificing well established insurance, benefits and services programs which continue to respond to new or changing employee or management requirements.

B. New Programs

1. Voluntary Investment Plan. 25% of TVA employees are participating in its "Take Stock" Plan, the precedent for our Voluntary Investment Plan. We anticipate that a higher percentage of Agency employees will enroll in the VIP in FY 72-76. This Element has the overall administrative responsibility for operating the plan and furnishing certain participation (services): employee counseling, promotion, and certain processing services such as enrollments, changes, withdrawals, settlements in death cases, and liaison with the broker.

2. Non-Staff Annuity Program. We have developed an entirely new approach to resolving what has been a recurring and expensive Agency problem in providing retirement benefits for non-staff personnel. We estimate that 1100 non-staff personnel will be offered the benefits of this new program, which will be handled centrally within the Office of Personnel. Each case must be reviewed individually to determine eligibility, payments to be made by the Agency, creditable time and other factors. Involved will be extensive correspondence with field stations, analysis of cases, adjudications, liaison [REDACTED] new procedures, and a separate record keeping system.

3. Employee Services Center. The concept of establishing a central location, similar to the Foreign Service Lounge where employees could obtain all employee services, is still a valid one although deferred temporarily by problems of adequate space and personnel. It is mentioned here so that consideration will be given to the concept in administrative and building planning.

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C. Significant Changes in Current Programs

1. Post-retirement servicing of approximately 400 CIARDS annuitants and 90 survivors now requires the full-time services of one officer and will grow. The number of annuitants will at least double in the 1972-76 period, and the survivor increase will probably be of the order of one-third again of the present number. Additional information is presented in the attachment.

2. The retirement counseling and technical functions will be called upon to handle the largest number of retirees in any comparable time in the Agency's history. Scheduled mandatory retirements under both systems will be approximately 1200 (round numbers). We expect a similar number of non-mandatory retirements based on past experience of a one-to-one relationship. The retirement pattern today is 65% Civil Service and 35% CIARDS. We estimate (allowing for CIARDS quota modification) that the total retirements for FY 72-76 will be composed of 840 CIARDS and 1560 CS for a total of 2400 retirements (round numbers). While counseling, pre-retirement and outplacement functions can be modified and are within management's control, the technical function of establishing and documenting creditable service, figuring retirement computation dates and annuity computations must be fully served as required by law and regulation. Additional information is presented in the attachment.

D. Resources

1. Detailees. We are assuming that four detailees, one from each Directorate, will continue to be available to perform the retiree counseling function.

2. FY 1972

a. Personnel Assistant, GS-07. The Voluntary Investment Program will require a GS-07 position in the Retirement Affairs Division to take care of the clerical and employee contact workload, discussed in paragraph B.1.

b. GS-11 Personnel Officer, GS-05 Clerk Typist. We will need these positions in the Retirement Affairs Division to administer the non-staff annuity program described in paragraph B.2. These employees will be handling caseload and related duties centrally for all non-staff personnel covered by the program.

c. GS-11 Personnel Officer. For reasons stated in paragraph C.1., we will need an additional GS-11 position in the Retirement Affairs Division to provide post-retirement services to annuitants and survivors.

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d. GS-09 Employee Benefits Assistant, GS-05 Clerk Typist. In our FY 1971-1975 Program Call we asked for one person in each year, FY 71-74, for the retiree technical function. The FY 71 request was not approved. Work volume is growing even faster than anticipated and we will need these two positions in the Retirement Affairs Division to deal with the urgent need described in paragraph C.2.

3. FY 1973

a. GS-07 Correspondence Assistant. We will need this position to deal with anticipated workload increases in the Retirement Affairs Division as discussed in paragraph C.

b. GS-11 Personnel Officer. The Suggestion and Invention Awards Program requires an additional officer, GS-11. This position was requested last year and still represents a valid requirement. This is a program that pays for itself, and savings to the Agency are directly related to the effort made to encourage ideas. Existing workload is too heavy for the present staff of two, and an increased effort would undoubtedly result in savings to the Agency.

c. One GS-11 and One GS-09 Personnel Officer. These positions are required to provide a secretariat service to the Agency's Administrative Allowance Committee. Initially, we believed that the assignment of these duties was temporary and that transient personnel could perform the duties. The responsibility has become permanent, and demands are such that permanent, trained personnel are needed to provide the quality service required. We will try to absorb this workload within the Office of Personnel during FY 72. By FY 73 we believe we will require these two positions to meet the demands of increasing workload, which includes preparation of cases for submission to the Committee, briefing of individuals departing for overseas, debriefing of individuals returning from the field, and related functions.

4. FY 1974

GS-09 Employee Benefits Assistant. Retirement workload should reach its peak for the period 1972-1976 in FY 1974. This additional position is needed to handle estimated workload as discussed in paragraph C.2.

5. Position Recap

FY 1972

2 - GS-11 positions
1 - GS-09 position
1 - GS-07 position
2 - GS-05 positions
6

FY 1973

2 - GS-11 positions (Suggestion Awards
& Allowance Committee)
1 - GS-09 position (Allowance Committee)
1 - GS-07 position (Retirement)
4

FY 1974

1 - GS-09 position (Retirement)

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6. Funds

a. In FY 1972, an estimated \$25,000 in additional funds will be needed for the Agency's Overseas Medical Benefit Program. Not only is the cost of medical care increasing, but the program itself has been expanded to cover employees and their dependents for one year after their departure from a PCS overseas assignment, as well as during such an assignment. Because actual expenditures for FY 1968 were \$268,000 and FY 1969 expenditures are \$262,000 and still rising, we feel that a minimum of \$280,000 will be required to fund the program in FY 1972.

b. An additional \$5,000 will be required for each year, beginning with FY 1973, for the Overseas Medical Benefits Program. These minimal increases will be required to meet the constantly increasing costs of medical care.

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Retirement Operations Branch, Retirement Affairs Division, OP

1. General Functions

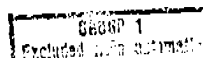
The Retirement Operations Branch (ROB) is one of three Branches in the Retirement Affairs Division providing a full range of retirement related services to Agency employees and management.

The services provided and responsibilities performed by each of these Branches are complementary as related to the pre-retirement, retirement and post retirement processes.

Whereas the Retirement Counseling Branch (RCB) is primarily responsible for general, long-range counseling necessary for pre-retirement planning, and the External Employment Assistance Branch (EEAB) provides assistance to employees seeking post retirement employment elsewhere in the labor market, the Retirement Operations Branch is engaged in providing services related to actual and immediately prospective retirement processing itself and the "technical" services to retirees, annuitants and survivors. These "technical" services, the specifics of retirement, include individual counseling of prospective retirees as to the legal and regulatory provisions, options and benefits of both the Civil Service and CIA Retirement and Disability Systems, verification of creditable Federal service (both civilian and military), computation of annuity estimates for voluntary and mandatory retirement dates, processing retirement applications and processing of the special documentation required for disability retirement, conversion of insurance coverage, purchase of service credits, ordering retirement medallions and certificates. This processing also includes close working relationships with Security, Cover Staff and Office of Finance to determine the influence a prospective retiree's past cover will have on the type of retirement documentation he will receive, the type of annuity check he will receive [REDACTED] the determination of the overt or covert of correspondence channels the retiree will use in corresponding with the Agency on retirement matters, and for obtaining the clearances for the award of retirement medallions, retirement certificates, service pins and letters from the Director so that such awards are not inconsistent with any cover carried by a retiree.

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The employee retirement processing functions and services provided by ROB are essentially the same for personnel covered under either the Civil Service or the CIARD systems. In the case of Civil Service participants however, once retired the on-going post-retirement services for both annuitants and their survivors are provided by the Civil Service Commission.

In the case of CIARDS participants on the other hand, on-going post-retirement services for annuitants and survivors must be provided by ROB.

The steady increase in the number of retirements (both systems) in past years and a sharp increase in the projected number of retirements for the period FY 72-76 has and will create an inescapable work load of considerable dimensions for the ROB staff (see Tab A).

A continuing "follow on" to the general increase in retirements processing and the inherent pre-retirement assistance work loads will be the number of CIARDS annuitants and survivors, requiring continued servicing so long as benefit entitlements are sustained (i.e. the life of the annuitant and in turn all eligible survivors).

The specific details of these post-retirement responsibilities are covered in more detail in Tab B.

2. Staffing Assignments Within Current ROB Authorized Ceiling to Meet Current Requirements

ROB currently is operating with an authorized ceiling of eight officers and five clerical support positions. This is essentially the same authorization established in 1967 premised against the workloads then in existence (one new grade GS-04 Records Clerk allowance having been added in October 1969).

Excluding the positions of Branch Chief (Employee Benefits Officer GS-14), her secretary (Clerk Steno GS-06) and the Branch Records Clerk (grade GS-04), the Branch is functionally organized as follows:

a. Secretariat for the Agency Retirement Board

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(1) One Employee Benefits Officer position grade GS-13 (also serves as Deputy Branch Chief);

(2) One Admin Assistant position grade GS-07;

b. CIA Retirement Element

(1) One Employee Benefits Officer position grade GS-12 (Employee Retirement Processing);

(2) One Employee Benefits Officer position grade GS-12 (Post-retirement services for annuitants and survivors);

(3) Two Employee Benefits Officer positions grade GS-11 (Employee retirement processing);

(4) One Clerk-Steno position grade GS-06.

c. Civil Service Retirement Element

(1) One Employee Benefits Officer position grade GS-11;

(2) One Employee Benefits Assistant position grade GS-09;

(3) One Clerk-Typist position grade GS-04.

3. Projected Additional Staffing Required to Meet Increased Regular Pre-Retirement Services (See Tab A)

The current authorized staffing of ROB is already hard pressed to fulfill the responsibilities of providing essential services to our retirees.

The increased volume of CIARDS retirements in FY 69 and FY 70 has necessitated the adjustment within our currently authorized ceiling by reducing staff coverage for Civil Service participants and assigning the allowance to the CIARDS element.

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An additional Employee Benefits Assistant grade GS-09 will be necessary by FY 72 within the Civil Service element to service the increased workload. An additional Clerk Typist grade GS-05 is also needed to satisfy the aggregate clerical requirements within the Branch.

4. Projected Additional Staffing Required for the Post-Retirement Servicing of the Increasing CIARDS Retiree Population (Annuitants and Survivors) (See Tab B)

The dimensions of this function have grown to the point that, since 1 July 1969, one officer has been assigned to it full time. The projections for future activity are such as to necessitate the assignment of an additional officer at the beginning of Fiscal Year 1972.

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The Pre-Retirement Technical Processing Function

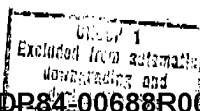
An appreciation of the workload developing in ROB during the period of the program call may be had by an examination of the volume of retirements to date and that to be expected in the years FY 1971 and FY 1972 through FY 1976. When making this examination, one must recall that the present staffing in ROB to process retirements was established in relation to workloads in 1967. The figures used for 1972-76 are as realistic and conservative as could be determined. The numbers of mandatory retirements is more or less an absolute, deriving from the use of age 60 as the retirement date. Since an analysis of actual retirements for the past three fiscal years revealed that the ratio of non-mandatory retirements was roughly 1 to 1, we have projected non-mandatory retirements on that basis. The figures shown are totals; that is, combining both retirement systems:

(actual) <u>FY 65 through FY 69</u>	(projected) <u>FY 70* FY 71</u>	(projected) <u>FY 72 through FY 76</u>
1139	324 455	2,384

The increase in retirement processing indicates a forthcoming workload beyond the capability of present staffing to handle. Two additional employees will be needed beginning FY 1972: one officer GS-09 and one clerical GS-05.

* Actual total retirements in FY 70 is 212 as of 1 March 1970.

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The CIARDS Post-Retirement Servicing Function

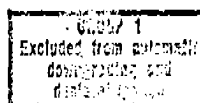
The enactment of the CIARDS in 1964 thrust upon the Agency the responsibility for servicing that program completely within house using internal resources of personnel and equipment. This responsibility extends to the post-retirement servicing of annuitants and to survivors under this system.

Our experience with the number of annuitants and with the multi-faceted problems of servicing survivors has brought the realization that there will eventually develop within the Agency an organization not unlike that of the Bureau of Retirement in the Civil Service Commission. Indeed, such an organization is already in its nascent stage as witnessed by the fact that one officer in RAD is now assigned to this function. Clearly, this function is going to grow as, over the years, the number of retirements under CIARDS increases. Furthermore, as a CIARDS annuitant dies, he is usually not replaced by a single survivor but, in most cases, by a multiple survivor situation - that is, widow and eligible children. The fact that in many such cases the children are in school, and that attendance in school establishes their eligibility for survivor benefits, RAD maintains continuing correspondence with not only a widow but with various schools in order to confirm the attendance of the children. A number of deceased CIARDS annuitants had been divorced and thus left more than one set of children thus to be serviced. In some cases, a deceased annuitant's relationships with his various survivors has required action by the courts, action which was followed closely by RAD and which gave direction to steps subsequently followed by RAD.

This responsibility for total in-house servicing of the retired CIARDS population and its survivors does not devolve solely upon RAD. The Office of Finance has a separate finance unit to handle all matters pertaining to annuities, taxes and (perhaps eventually) deductions for Medicare.

The dimensions of this total responsibility will increase over the years as the population in the retired CIARDS group increases.

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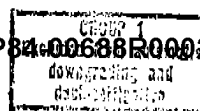
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Viewing the years in the period of the program call we see the size and growth of this population as follows. At the present time (March 1970), there is a total CIARDS retired population of approximately 500 survivors and annuitants. By the end of FY 74 we shall have added at least 400 CIARD annuitants to this population. To this we add an estimated additional 100 survivors; this estimate is based on the fact that we had approximately that number of survivors in relation to the first quota of 400 annuitants (FY 1964 - FY 1969). In addition, we estimate an additional 30 survivors from the first group (FY 64 - FY 69) of annuitants coming under our purview in the period through the end of FY 1974. We thus estimate that the end of FY 1974 would see an increase in the CIARDS population of 530. But the period of the program call extends two additional fiscal years. For these two years we estimate an additional 200 CIARDS retirements (assuming an increase in quota to correspond with an increase in eligibles for retirement). By the end of FY 1976, therefore, we estimate, on a conservative basis, an increase of 730 to the retired CIARDS population. Added to the present total of approximately 500 we foresee, again conservatively, a total of 1,230 population in CIARDS as of that date.

The one officer in RAD who is presently engaged in servicing the CIARDS retired population (annuitants and survivors) is committed full time to that function. The following table of projections shows how this workload will increase during the years covered by the program call. In these projections the 130 survivors were distributed arbitrarily and evenly over the five year period since we do not, of course, have a more valid method of determining when action on the part of RAD shifts from concern for an annuitant to concern for a survivor.

<u>Year (Fiscal)</u>	<u>Cumulative Total of Annuitants and Survivors</u>
1970 (end)	500
1971	631
1972	764
1973	897
1974	1,030
1975	1,130
1976	1,230

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While this one officer can probably carry the workload through FY 1971 (admittedly being taxed to full capacity) it is unlikely that one person could carry the load beyond that time. Beginning in FY 1972, therefore, another officer must be assigned to this function.

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PROGRAM ELEMENT: RECRUITMENT AND PLACEMENT

A. Objective

Controlled staffing is the major objective of the planning period, to be achieved through action toward the following interrelated goals: management of personnel input against precise requirements; effective assistance to supervisors and employees in resolving problems of personnel placement and management; mechanisms and procedures to adjust imbalances in distribution of personnel. Within the foreseeable constraints of a stabilized organization and continued ceiling controls, more than usual attention must be paid to the configuration of the manpower structure, internal flexibility in adjusting to changing needs, and promoting the job satisfaction and stability of the work force.

B. Significant Changes

No new programs are anticipated in this Program Element, but there will be substantial changes in emphasis and direction, as follows:

1. Procedures will be strengthened to control the volume and timing of personnel input.
2. Recruitment will shift from a campus-oriented program to one characterized by a low profile and selective use of specialized sources.
3. The Cooperative Education and Summer Intern Programs will be expanded to about 175 and 50 respectively to serve as controllable and substantial sources of professional manpower. Although we can foresee the need for an additional GS-11 position in the planning period to assist in administering the expanded program, we are not asking for the increase at this time on the assumption that the need can be met by reassignment. The requirement will be reviewed again as we come closer to the planning period.
4. As an EEO employer we will offer an opportunity to disadvantaged clerical employees, recruited in the local area, to upgrade their skills to usable levels through training.
5. Provision for follow-up and pre-exit interviews will be extended, to promote individual job satisfaction and reduce attrition.
6. We will strengthen mechanisms and procedures for coordinated action to effect internal transfers of individuals and to adjust imbalances in personnel distribution.

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C. Resources Required

1. By the beginning of FY 72 the Recruitment and Placement Element will have reduced its staffing complement from 114 to 103 positions. Insofar as they can be foreseen now, staffing needs can be met within the 103 level.

2. Funds

a. \$8,000 in additional funds will be needed to cover the increased cost of domestic PCS travel because of the planned relocation of five domestic recruiters by the end of FY 1972.

b. \$100,000 will be required in FY 1972 to provide for the salary and benefits of an additional 15 AE in the Temporary Assignment Section (TAS). Experience has demonstrated that approximately 200 AE is required in the TAS to satisfy the Agency's requirements for clerical personnel. Unfortunately, we experienced a large clerical shortfall in the TAS during FY 1969 with only 133 AE achieved. Due to an intensified clerical recruitment effort to overcome the FY 1969 shortfall, as well as to fill normal clerical requirements, we have been able to maintain an AE of 206 in the TAS through the first half of FY 1970. This increase in clerical recruitment efforts will not be sufficient to meet minimum Agency clerical requirements, however, unless the TAS has an AE of at least 195 in FY 1972.

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PROGRAM ELEMENT: PLANS AND CONTROL

A. Objectives

Planning emphasis will be on the personnel flow processes as a guide to input, promotion and retirement policies and on career pathing and development of career matrices in support of the internal transfer and other placement efforts. There will be increased emphasis on job design and the maintenance of current and realistic staffing complements to improve job satisfaction and the allocation and utilization of human resources. With current plans to have all the new generation ADP systems in operation during the FY 72-74 period the big push in records and control will be to accomplish the major adjustment to the Support Information Processing System. The development of reporting norms so that management reporting can be on a "variance" basis is essential to assist top management in the many grave decisions on personnel policies which must be made in the years ahead in both staff and non-staff areas.

B. Significant Changes

Although no new programs are anticipated, there will be extensive changes of emphasis. The primary responsibility of the Office of Personnel to provide leadership in the increased utilization of our personnel assets in a period of stabilized personnel strength will affect planning, staffing requirements and qualifications inventory. It will be necessary to update staffing complements, insuring that a proper mix of occupational skill and qualification requirements are depicted. Increased attention must be given to systems for career development, upward and lateral mobility, succession management and the development and assignment of our young professional officers. It will be necessary to review our basic Career Service System as presently constructed in order to recommend changes compatible with Agency personnel needs in the 70's; to analyze occupational groupings within the Agency for patterns of entrance and upward career movement; to identify knowledge and skill requirements for performance at each step of the career patterns thus defined.

These changes in emphasis will require close coordination between manpower requirement development, personnel research and qualifications inventory, using to full advantage the capability of third generation computer equipment. There will be an increase in reporting requirements in the period prior to implementation of SIPS as the old and the new systems are blended. An increase in the number of people editing and conforming information for the computers will take place, presumably as part of a centralized Data Management Center. We hope to handle the various changes in emphasis by redeployment with the exceptions noted below. There will be, for example, a need for a GS-13/14 Statistical Analyst to develop and apply sophisticated statistical and mathematical techniques (model building, regression analysis, probability analysis) to the personnel management system. We are assuming that the function of

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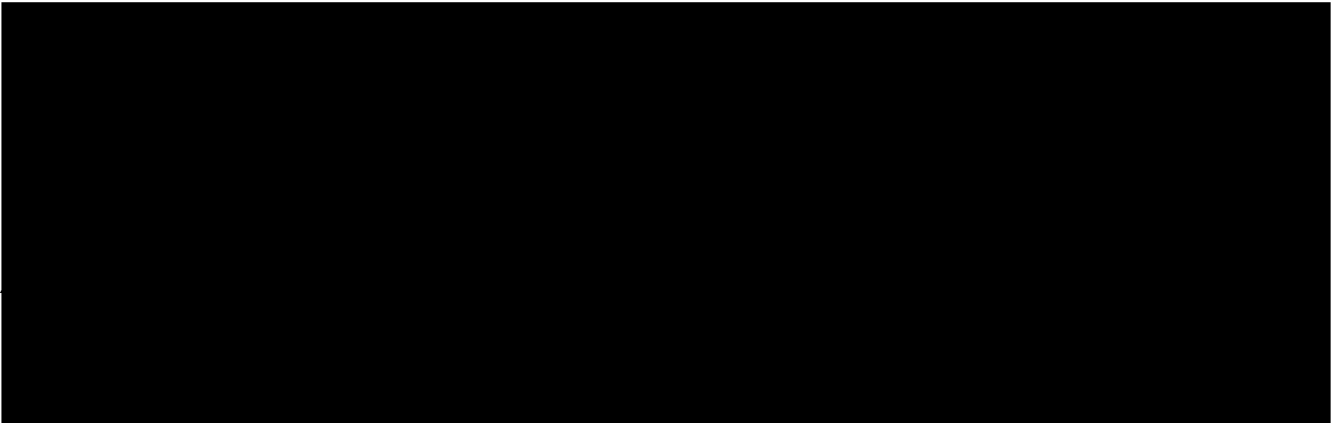
writing Office of Personnel history will have progressed by 1972 to the point where we can obtain this Statistical Analyst position by conversion and upgrading of a present GS-12 position.

C. Resources

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FY 1972 - two GS-12/13 Salary and Wage Officers

FY 1973 - one GS-12/13 Salary and Wage Officer, one GS-05 Clerk



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PROGRAM ELEMENT: MANAGEMENT SUPPORT

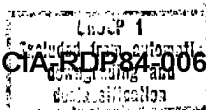
A. Objectives

1. In managing the personnel program it will be necessary to redeploy assets as reflected in Chart A in order to accomplish the objectives set forth in the various Program Elements. Within the Program Elements there will also be shifts such as within the Recruitment and Placement Element where a somewhat lower estimate of annual input caseload (Table 2) will permit increased attention to internal placement requirements. We are asking for additional positions only to keep pace with our increasing retirement population, with the extension of benefits to non-staff people, and to improve our planning and position management capability. These requests are for positions which, at present reading, might very well be filled from the SP Career Service at large.

2. With respect to the Personnel Career Service we will press on with the implementing of our Succession Development Plan and continue to use the SP Service as a leader in the development of career models, career patterning and matrices as a guide to the other Services.

B. Resources

No additional resources are contemplated for the Office of the Director of Personnel. The additional resources are carried under the appropriate program elements.



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PROGRAM ELEMENT: SPECIAL PROGRAMS

A. Objectives

1. Same
2. Same

B. New Programs

1. Voluntary Investment Plan

Same

2. Non-Staff Annuity Program

We have developed an entirely new approach to resolving what has been a recurring and expensive Agency problem in providing retirement benefits for non-staff personnel. We estimate that 1100 non-staff personnel will be offered the benefits of this new program, which will be handled centrally within the Office of Personnel. Each case must be reviewed individually to determine eligibility, payments to be made by the Agency, creditable time and other factors. Involved will be extensive correspondence with field stations, analysis of cases, adjudications, liaison with [REDACTED] new procedures, and a separate record keeping system.

3. Employee Services Center

Same

C. Significant Changes in Current Programs

1. Post-retirement servicing of approximately 400 CIARDS annuitants and 90 survivors now requires the full-time services of one officer and will grow. The number of annuitants will at least double in the 1972-76 period, and the survivor increase will probably be of the order of one-third again of the present number. Additional information is presented in the attachment.

2. The retirement counseling and technical functions will be called upon to handle the largest number of retirees in any comparable time in the Agency's history. Scheduled mandatory retirements under both systems will be approximately 1200 (round numbers). We expect a similar number of non-mandatory retirements based on past experience of a one-to-one relationship. The retirement pattern today is 65% Civil Service and 35% CIARDS. We estimate (allowing for CIARDS quota modification) that the total retirements for FY 72-76 will be composed of 840 CIARDS and 1560 CS for a total of 2400 retirements (round numbers). While counseling, pre-retirement and outplacement functions can be modified and are within management's control, the technical function of establishing and documenting creditable service, figuring retirement computation dates and annuity computations must be fully served as required by law and regulation. Additional information is presented in the attachment.

D. Resources

1. Detailees

Same

2. FY 1972

a. Personnel Assistant, GS-7

The Voluntary Investment Program will require a GS-7 position in the Retirement Affairs Division to take care of the clerical and employee contact workload, discussed in paragraph B.1.

b. GS-11 Personnel Officer, GS-5 Clerk Typist

We will need these positions in the Retirement Affairs Division to administer the non-staff annuity program described in paragraph B.2. These employees will be handling caseload and related duties centrally for all non-staff personnel covered by the program.

c. GS-11 Personnel Officer

For reasons stated in paragraph C.1, we will need an additional GS-11 position in the Retirement Affairs Division to provide post-retirement services to annuitants and survivors.

d. GS-9 Employee Benefits Assistant, One Clerk Typist GS-5

Originally we asked for one person in each year, FY 71-74, for the retiree technical function. The FY-71 request was not approved. Work volume is growing faster than anticipated and we will need these two positions in the Retirement Affairs Division to deal with the urgent need described in paragraph C.2.

3. FY 1973

a. GS-7 Correspondence Assistant

We will need this position to deal with anticipated workload increases in the Retirement Affairs Division as discussed in C.1 and 2.

b. GS-11 Personnel Officer

The Suggestion and Invention Awards Program requires an additional officer, GS-11. This position was requested last year and still represents a valid requirement. This is a program that pays for itself, and savings to the Agency are directly related to the effort made to encourage ideas. Existing workload is too heavy for the present staff of two, and an increased effort would undoubtedly result in savings to the Agency.

c. One GS-11 and One GS-9 Personnel Officer

These positions are required to provide a secretariat service to the Agency's Administrative Allowance Committee. Initially, we believed that the assignment of these duties was temporary and that transient personnel could perform the duties. The responsibility has become permanent, and demands are such that permanent, trained personnel are needed to provide the quality service required. We will try to absorb this workload within the Office of Personnel during FY-72. By FY-73 we believe we will require these two positions to meet the demands of increasing workload, which includes preparation of cases for submission to the Committee, briefing of individuals departing for overseas, debriefing of individuals returning from the field, and related functions.

4. FY 1974

GS-9 Employee Benefits Assistant

Retirement workload should reach its peak for the period 1972-1976 in FY 1974. This additional position is needed to handle estimated workload, ^{or discuss in} paragraph C.2.

5. Position Recap

FY 1972

2 - GS-11 positions
1 - GS-09 position
1 - GS-07 position
2 - GS-05 positions
6

FY 1973

2 - GS-11 positions (Suggestion Awards
& Allowance Committee) .
1 - GS-09 position (Allowance Committee)
1 - GS-07 position (Retirement)
4

FY 1974

1 - GS-09 position (Retirement)

6. Funds

Same as old 11 a and b.

We will try to absorb this
workload within the office of
Personnel during FY 1972, ~~BY~~
FY 1973, we believe we will require these
two positions etc. as is.

OFFICE OF PERSONNEL

FUNCTIONAL STATEMENT (Cont)

Deputy Director of Personnel for Special Programs

Benefits and Services Division

ADMINISTRATIVE

~~This Division is responsible for all phases of personnel relations activities~~ including counseling, pre-exit interviewing and exit processing, processing of medical claims under statutory programs, administration of a wide range of Agency-sponsored and statutory insurance programs, administration of various employee recognition programs, and for other employee activities including recreation, fund drives, car pools, and blood donors. It is also responsible for the centralized handling of employee emergencies and the handling of missing and captured personnel falling within the coverage of the Missing Persons Act, and for providing guidance on casualty planning for sensitive or hazardous undertakings. In addition, this Division is responsible for providing a central processing service to assist Agency personnel in performing official travel, and for providing administrative direction to the Northwest Federal Credit Union.

Contract Personnel Division

This Division is responsible for recommending policy standards governing Agency contracts for personal services and certain other special contracts required in support of covert operations; for the development and interpretation of policies relating to Staff Agent personnel and the complete processing of such personnel; for monitoring and reviewing industrial contracts involving personal services and for the administration and granting of allowances and differentials for Agency personnel serving overseas. These responsibilities include preparation and execution of contracts and the review of field contracts submitted to Headquarters; the processing of Agency consultants; and the maintenance of records on non-staff personnel. The Division is also responsible for providing staff guidance on problems concerned with unemployment compensation for covert personnel and on social security matters for all types of Agency personnel.

S-E-C-R-E-T

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